Duplicate Client Check

Purpose: When creating a new Client Profile or accepting a Referral, WITS will search ALL DHW REGIONS for clients with:

- First 3 characters of first name, first 3 characters of last name, and year of birth and will exclude clients with first or last name with less than 3 characters.
  OR
- First character of first name and last 4 numbers of SSN (excluding SSN = 0000)
  OR
- Soundex* of first name, Soundex of last name, and year of birth
  OR
- Soundex of first name and last 4 numbers of SSN (excluding SSN = 0000)

Note: When completing a designated examination (DE), enter the record into WITS according to the region where the clinician is assigned, not in the region where the client lives/receives services. For example: Clinician Sally is located in Region 2, but is helping Region 1 by performing a DE for a client located in Region 1. Sally will enter the DE into WITS in Region 2.

*Soundex is a phonetic algorithm for indexing names by sound as pronounced in English. This will allow WITS to match names despite minor differences in spelling.

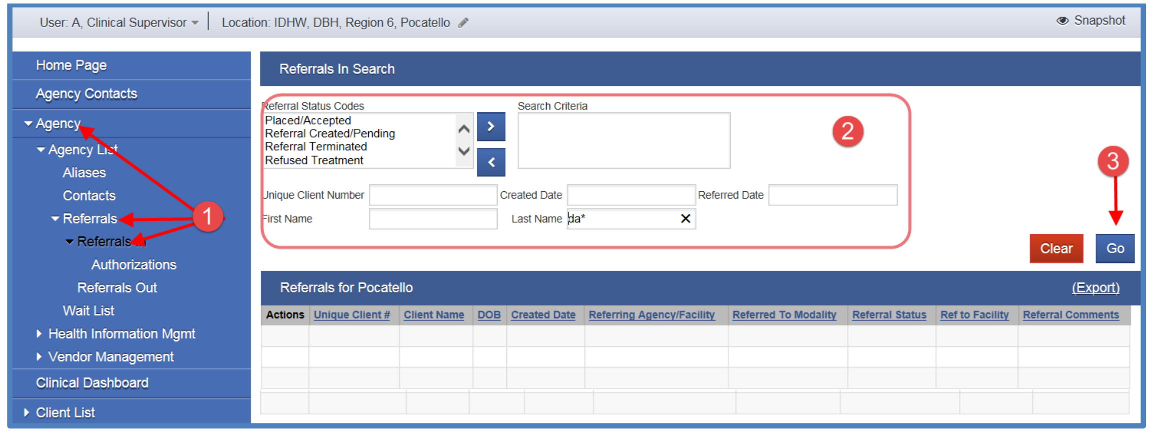
Accepting a Referral

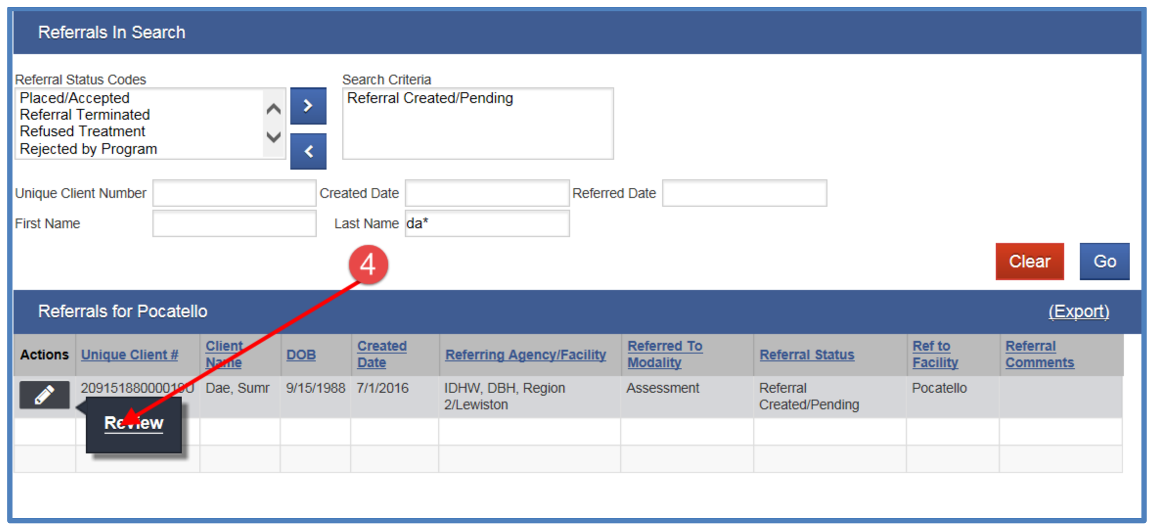
1. Getting here: Login, click **Agency**, **Referrals**, **Referrals In** on the Navigation Pane (left menu).

2. **Enter the search criteria**.

3. Click .

4. Hover over  under Actions and click **Review**.





5. **Update the Appointment Date and Status** if appropriate.

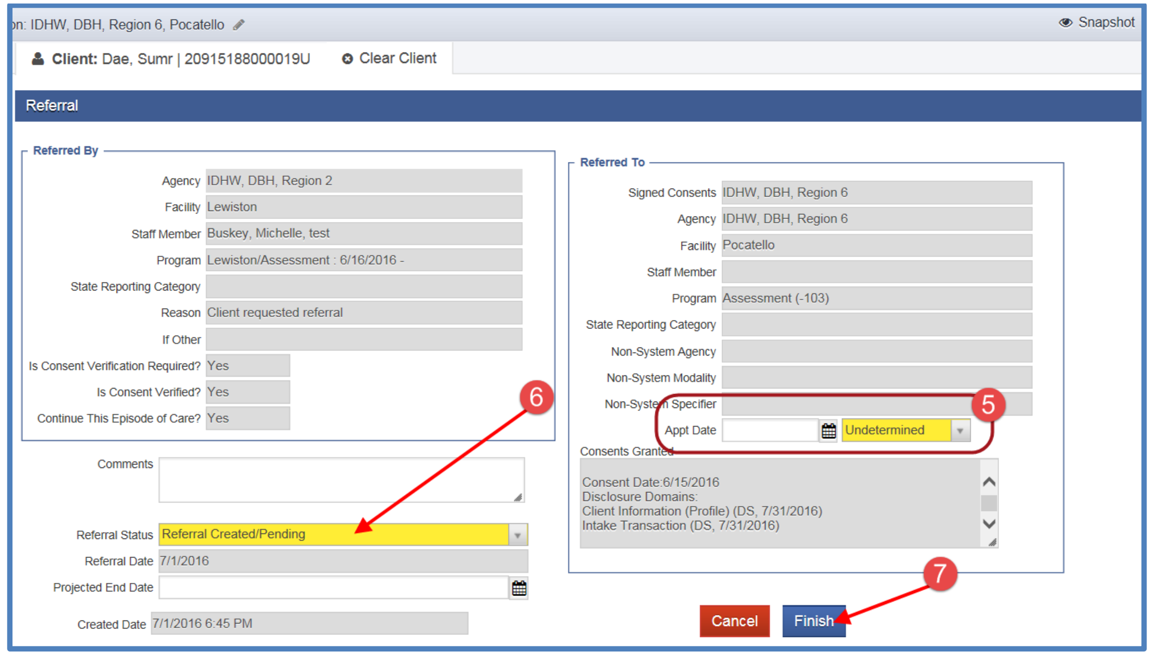
6. Change the Referral Status to **Placed Accepted**.

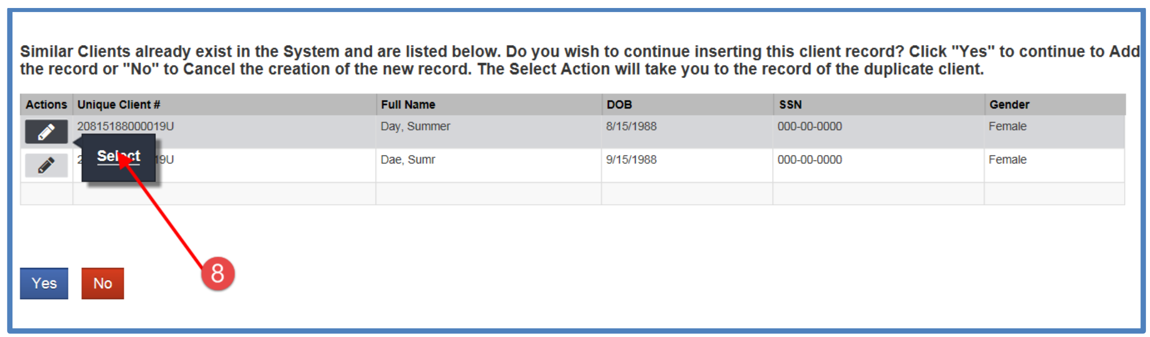
7. Click Finish.

8. A list of similar clients displays. **Click Select if one of the clients displayed matches your client**. If you select a similar client from the list, the most recently updated Client Profile will be created in your Region.

What if none of the clients listed is my client?

- **Click Yes to continue and create a new Client Profile.**
  OR
- **Click No to cancel the creation of the Client Profile.**





9. A Client Profile with information from the selected client will be created in your region, including:

- Client Name & other demographic information
- Alternate Names (if any)
- Additional Information
- Contact Information, including all addresses
- Allergies (if any)
- Benefit Application (if any).

10. Click 

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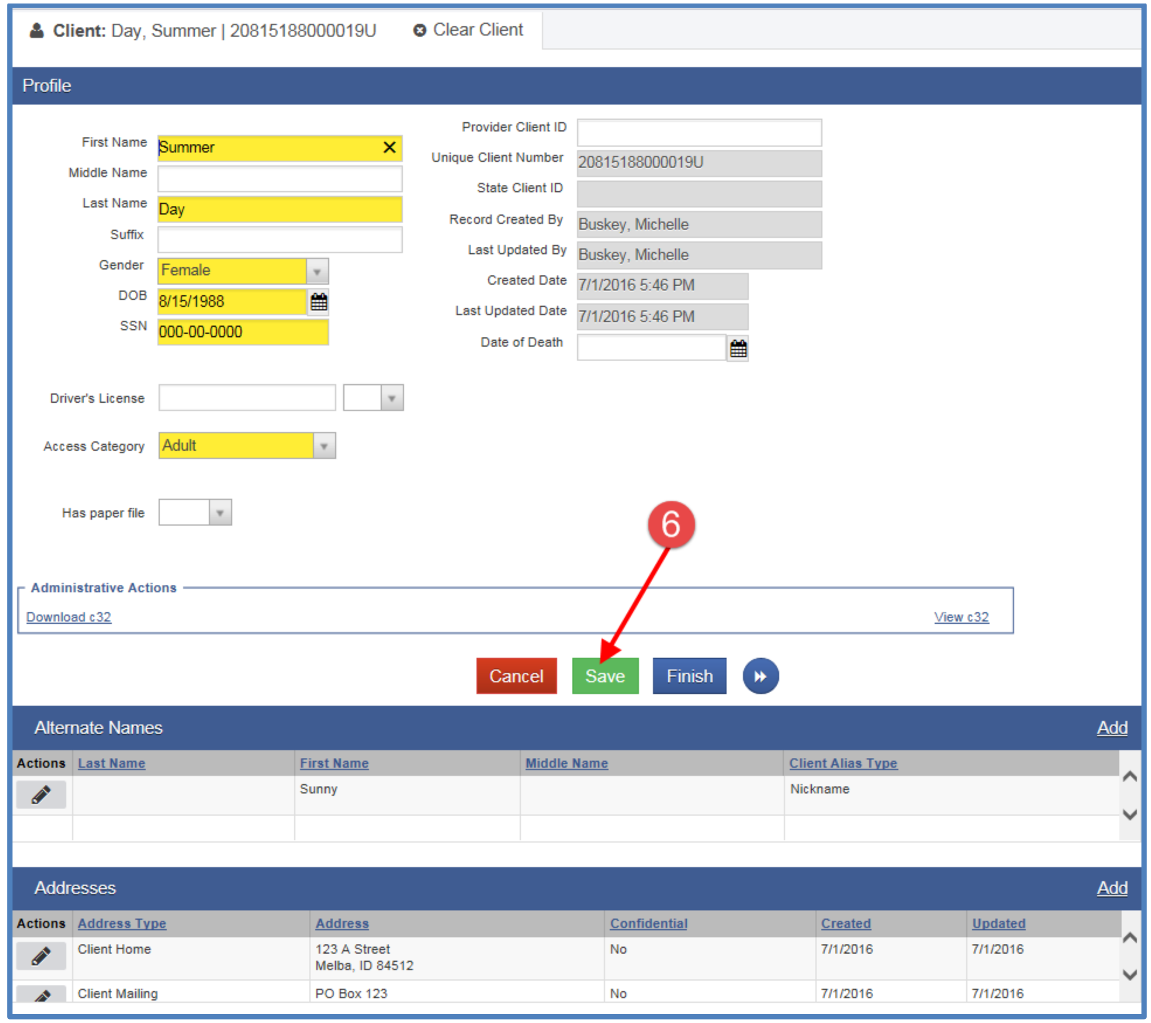
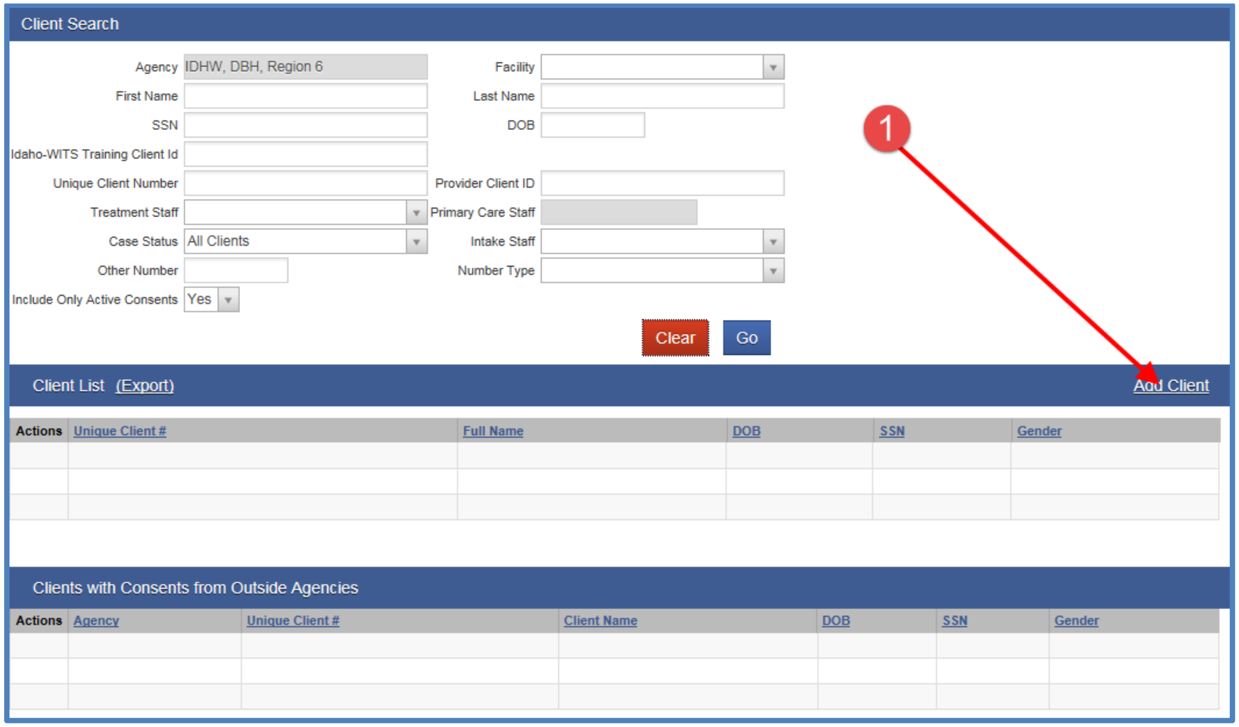


Creating a Client Profile

1. Getting here: Login, click **Client List** on the Navigation Pane (left menu). **Search for the client**. If you are unable to find the client, click **Add Client**.

Note: When completing a designated examination (DE), enter the record into WITS according to the region where the clinician is assigned, not in the region where the client lives/receives services.

- **Example:** Clinician Sally is located in Region 2, but is helping Region 1 by performing a DE for a client located in Region 1. Sally will enter the DE into WITS in Region 2.



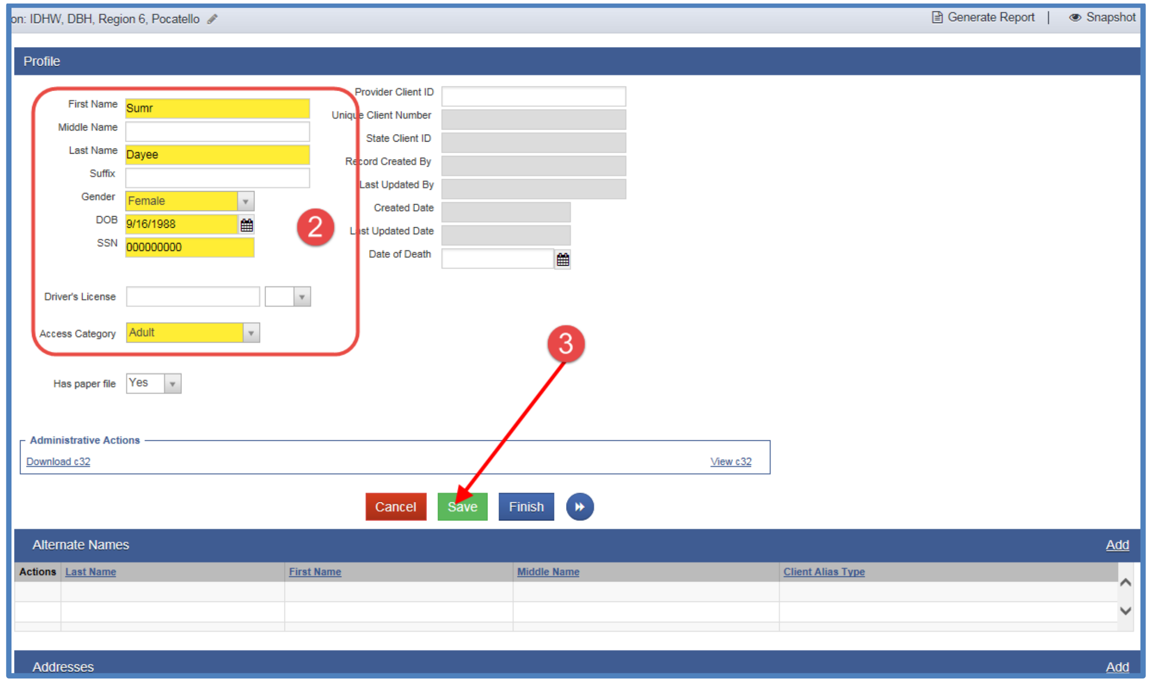
2. Complete all required (yellow) fields.

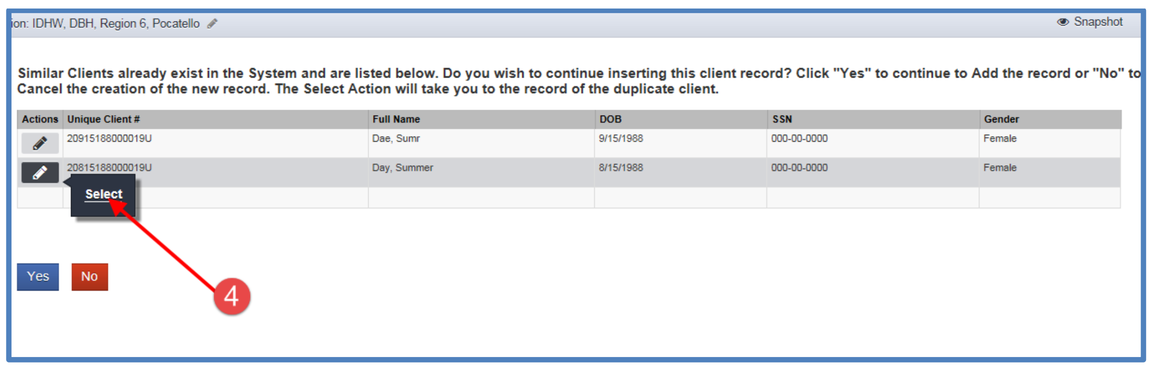
3. Click Save.

4. A list of similar clients displays. **Click Select if one of the clients displayed matches your client**. If you select a similar client from the list, the most recently updated Client Profile will be created in your Region.

What if none of the clients listed is my client?

- **Click Yes to continue and create a new Client Profile.**
  OR
- **Click No to cancel the creation of a Client Profile.**





5. A Client Profile with information from the selected client will be created in your region, including:
   - Client Name & other demographic information
   - Alternate Names (if any)
   - Additional Information
   - Contact Information, including all addresses
   - Allergies (if any)
   - Benefit Application (if any).

6. Click 

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